



Book of Business Export Job Aid Agency Managers

Overview

Agency Managers are now able to access an aggregate Agency Book of Business from their CalHEERS Agency portal. They also have access to export their own Book of Business, as well as a Book of Business for an individual agent in the agency roster.

The Book of Business reflects consumer data from the week prior on Friday at 9 p.m.. Any changes made after 9 p.m. on Friday, the change will not be reflected until the following Friday between 9 p.m. and midnight.

The Book of Business is provided as an Excel document, which allows you the flexibility to sort, manipulate and maintain client data. The Book of Business contains Covered California, Mixed Household, and Medi-Cal members.

Please note: using the filters on the Active Consumer list does not populate the results of the exported Book of Business. All consumers delegated to either the Agent or the Agency will populate in the export.

Personally Identifiable Information (PII)

PII is found within the Book of Business export and must remain secure and confidential in accordance with Covered California's Security and Privacy policies as outlined in the [Agent Agreement](#), including all applicable laws and regulations. It is the Agent's responsibility to ensure that they handle this information in the appropriate manner. Remember that emails with consumer PII must be encrypted or secured.

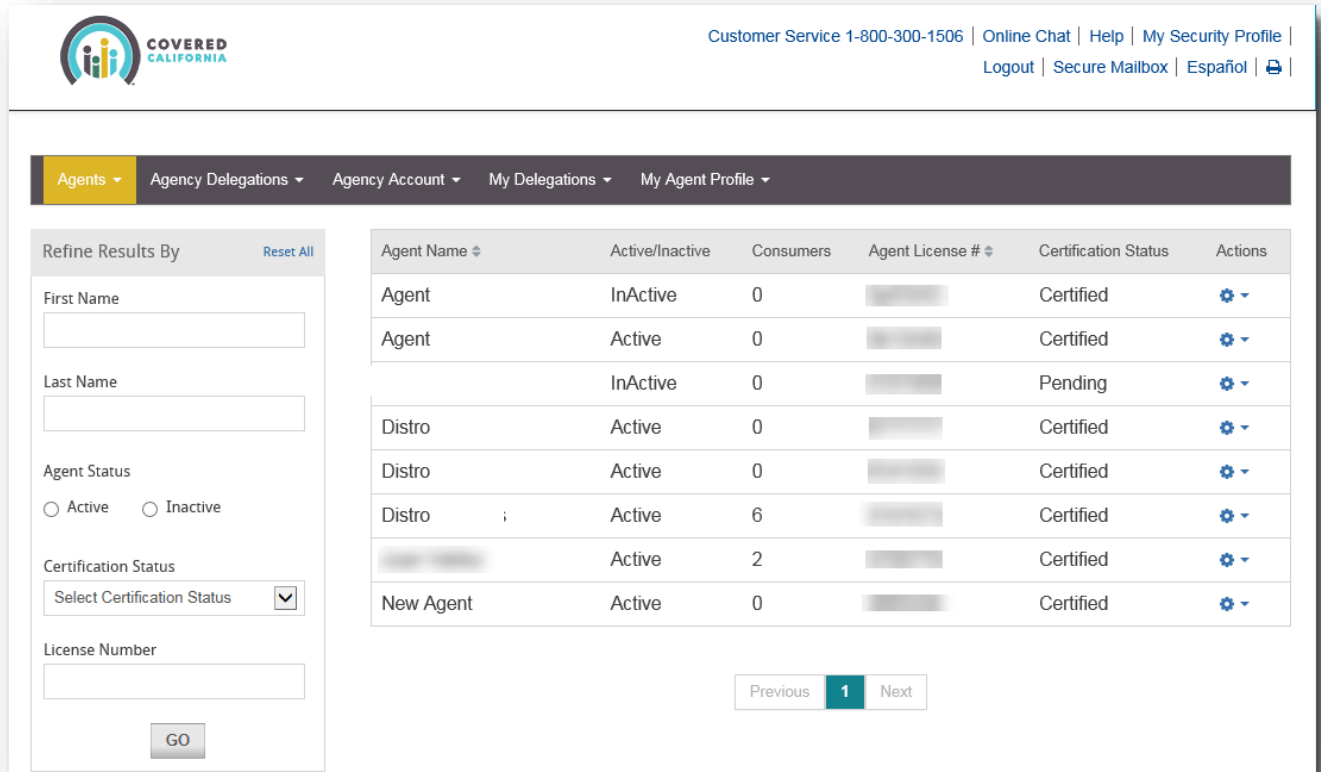
The Book of Business is provided as an Excel document, which allows you the flexibility to sort, manipulate and maintain client data. The Book of Business contains Covered California, Mixed Household and Medi-Cal members.

This Job Aid is designed to walk you through the steps to obtain your Agency files.

-See Step-by-Step Instructions Below-

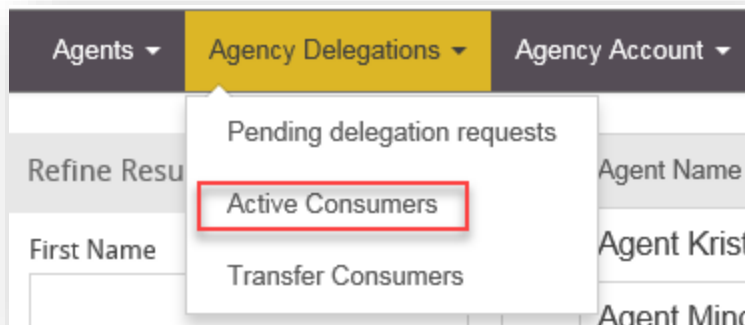
Agency Managers:

1. Log into your CalHEERS Agency Portal and you land on this homepage.



The screenshot shows the CalHEERS Agency Portal homepage. At the top, there is a navigation bar with the Covered California logo on the left and links for Customer Service (1-800-300-1506), Online Chat, Help, My Security Profile, Logout, Secure Mailbox, and Español on the right. Below the navigation bar is a dark grey menu with several tabs: Agents (selected), Agency Delegations, Agency Account, My Delegations, and My Agent Profile. The main content area is divided into two sections. On the left is a 'Refine Results By' sidebar with fields for First Name, Last Name, Agent Status (Active/Inactive), Certification Status (a dropdown menu), and License Number, along with a 'GO' button. On the right is a table with the following columns: Agent Name, Active/Inactive, Consumers, Agent License #, Certification Status, and Actions. The table contains several rows of data, including 'Agent', 'Distro', and 'New Agent' entries. At the bottom of the table, there are 'Previous', '1', and 'Next' buttons.


2. From the “Agency Delegations” drop down menu, select “Active Consumers.”



This screenshot shows a close-up of the 'Agency Delegations' dropdown menu. The menu is open, displaying three options: 'Pending delegation requests', 'Active Consumers' (which is highlighted with a red rectangular box), and 'Transfer Consumers'. The background shows parts of the main portal interface, including the 'Agents' and 'Agency Account' tabs and the 'Refine Results' sidebar.

3. On the “Active Consumer” page, there are two options for Book of Business Export:

- [Export Book of Business \(All Agents\)](#)
- [Export Book of Business for an Agent](#)




[Customer Service 1-800-300-1506](#) | [Online Chat](#) | [Help](#) | [My Security Profile](#) | [Logout](#) | [Secure Mailbox](#) | [Español](#) | [📄](#)


[Agents](#) ▾ | [Agency Delegations](#) ▾ | [Agency Account](#) ▾ | [My Delegations](#) ▾ | [My Agent Profile](#) ▾


Active Consumers








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Sort By: ▾

[Export Book of Business \(All Agents\)](#) 

[Export Book of Business for an Agent](#) 

[Change Delegation](#) 

SELECT	HOUSEHOLD	CASE DETAILS	COVERAGE	AGENT	ACTIONS
<input type="checkbox"/>				Distro Nicholas	 ▾
<input type="checkbox"/>		Case ID:  Application Year: 2017	 Platinum 90 HMO Plan Type: HMO Premium: \$403.59/month Office Visit: \$15 Copay Generic Drug: \$5 Copay Deductible: \$0.0		 ▾

4. To Export a Book of Business for your entire Agency, select “Export Book of Business (All Agents).” This will export an excel file with all consumer data for your Agency.

Please Note: Column “AV” displays each consumer’s delegated Agent from your Agency. You can use this as a sort criteria, if needed.

- To export a Book of Business for a specific Agent within your Agency, select the “Export Book of Business for an Agent” link. You will be navigated to to the “Select an Agent for exporting Book of Business” page.



Agents ▾ Agency Delegations ▾ Agency Account ▾ My Delegations ▾ **My Agent Profile ▾**

Select an Agent for exporting Book of Business

Search for an Agent

Agent First Name Agent Last Name Site

Agent Email Agent License No **SEARCH**

Pick Agent	Agent Name	Email	Primary Site	EXPORT
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To see a list of agents, please enter information in the search box above.

- Here you must enter complete information into the search field/s of your choosing. DO NOT type partial info as the results will not display.

- i.e. Do not enter “Tim” for Timothy, if you are looking for Timothy – you must enter the entire first name

Search for an Agent

Agent First Name Agent Last Name Site

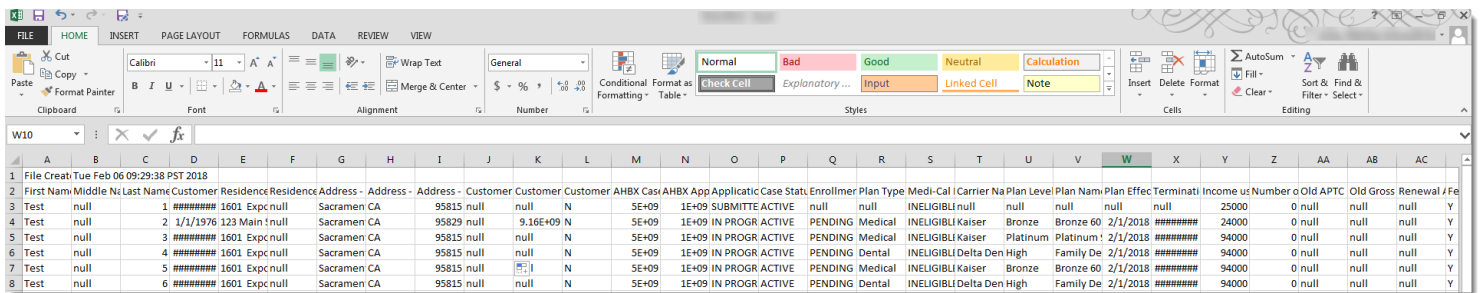
Agent Email Agent License No **SEARCH**

Pick Agent	Agent Name	Email	Primary Site	EXPORT
<input checked="" type="radio"/>	Distro		Sacramento, CA 95815	
<input type="radio"/>	Distro	none@none.com	1 Rd Rancho Cordova, CA 95670	

- After searching for the Agent you wish to export a Book of Business, select the radio button next to the name and select the "Export" button on the right side of the page.

Pick Agent	Agent Name	Email	Primary Site	EXPORT
<input checked="" type="radio"/>	Distro		Sacramento, CA 95815	
<input type="radio"/>	Distro	none@none.com	Rancho Cordova, CA 95670	

- The Book of Business will export in an excel file with only the consumer data for the Agent specified and you are able to view, sort, and view enrollment data, consumer data, Med-Cal information, etc. for the consumers.



File	Home	Insert	Page Layout	Formulas	Data	Review	View
1	File Crea Tue Feb 06 09:29:38 PST 2018						
2	First Nam Middle N Last Name Customer	Residence	Residence Address -	Address -	Address -	Customer	Customer
3	Test null	1 1/1/1976 123 Main	1 null	Sacramen CA	95815 null	9.18E+09 N	SE+09
4	Test null	2 1/1/1976 123 Main	2 null	Sacramen CA	95829 null	9.18E+09 N	SE+09
5	Test null	3 1/1/1976 123 Main	3 null	Sacramen CA	95815 null	9.18E+09 N	SE+09
6	Test null	4 1/1/1976 123 Main	4 null	Sacramen CA	95815 null	9.18E+09 N	SE+09
7	Test null	5 1/1/1976 123 Main	5 null	Sacramen CA	95815 null	9.18E+09 N	SE+09
8	Test null	6 1/1/1976 123 Main	6 null	Sacramen CA	95815 null	9.18E+09 N	SE+09

Understanding the Book of Business Report

The [Book of Business Description Chart](#) provides a description of the fields found within the Book of Business.

Please note: If the information is not applicable or not provided, the data under each column will be blank.